



Quick Look at **Resident Consent**

Use this Quick Look Guide to learn how to access a resident's information from the Referral Inbox



From the Referral Inbox, click the Edit button next to the Referral



My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

Referral Inbox

Client

Search



Location

1 items selected



Resource

0 items selected



Status

3 items selected

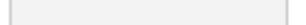


Created



Days Open

None



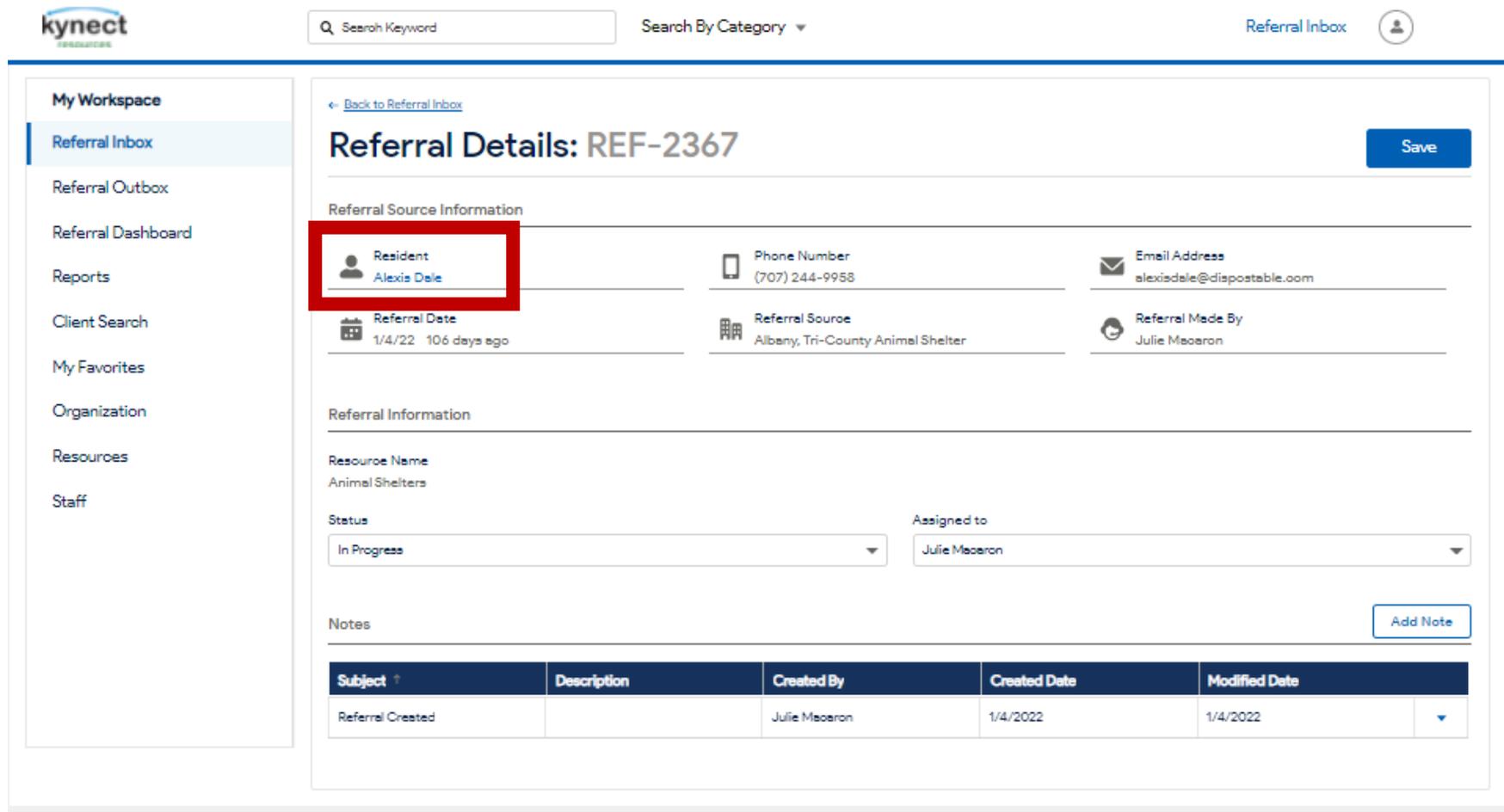
Search

Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2367	Alexis	Dale	1/4/2022	106 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼



On the Referral Details screen. Click the **Resident Name** which is a blue hyperlink.



The screenshot shows the 'Referral Details: REF-2367' page. The left sidebar contains navigation options: My Workspace, Referral Inbox (selected), Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff. The main content area includes a search bar, a 'Referral Source Information' section with fields for Resident (Alexis Dale), Phone Number (707) 244-9958, Email Address (alexisdale@dispostable.com), Referral Date (1/4/22, 106 days ago), Referral Source (Albany, Tri-County Animal Shelter), and Referral Made By (Julie Mason). Below this is the 'Referral Information' section with Resource Name (Animal Shelters), Status (In Progress), and Assigned to (Julie Mason). At the bottom, there is a 'Notes' section with an 'Add Note' button and a table of referral history.

Subject	Description	Created By	Created Date	Modified Date
Referral Created		Julie Mason	1/4/2022	1/4/2022



Click the Request Consent action button.

[← Back to Clients](#)

Request Consent [Create Referral](#)

Client Information		Contact	
Client ID	Gender	Email Address	Contact Preference
DOB		Mobile Phone	

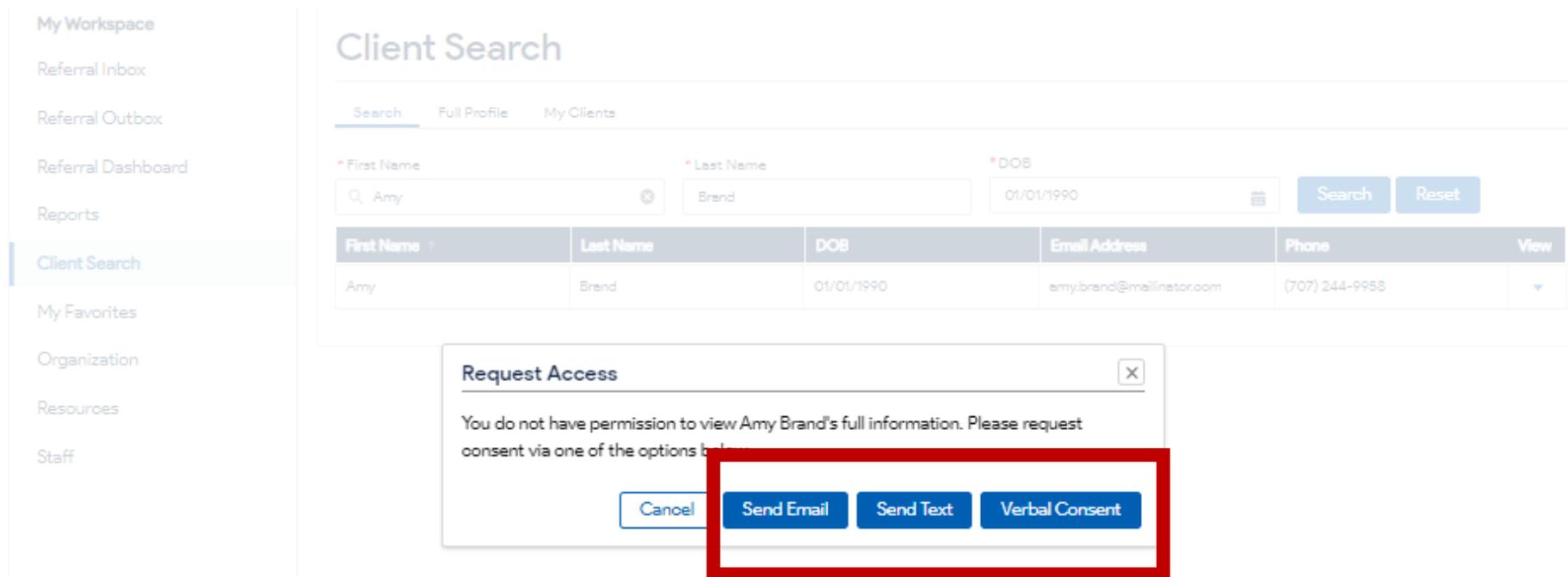
Needs – SDOH



Consent is granted via email, text or captured verbally. Select the method of consent request.

If **Send Email** or **Send Text** is selected, the **kynect resources** system will generate a **Consent** request to that resident.

Once the resident responds to kynect via email or text, Consent is granted to view their information.

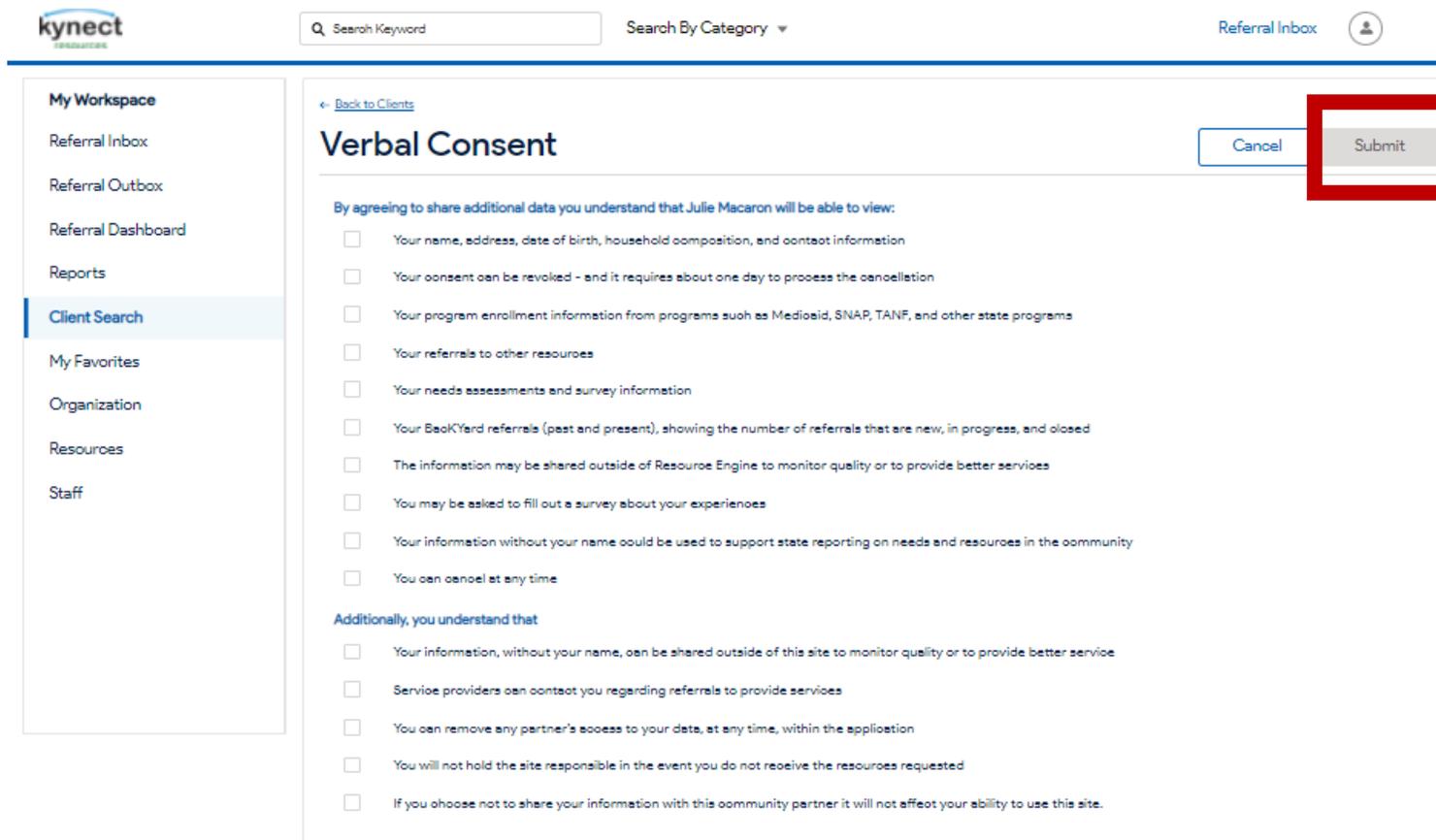


The screenshot shows the 'Client Search' interface. On the left is a navigation menu with items: My Workspace, Referral Inbox, Referral Outbox, Referral Dashboard, Reports, Client Search (highlighted), My Favorites, Organization, Resources, and Staff. The main area has tabs for Search, Full Profile, and My Clients. Below the tabs are search filters for First Name (Amy), Last Name (Brand), and DOB (01/01/1990), with Search and Reset buttons. A table below shows one client record: Amy Brand, DOB 01/01/1990, Email Address amy.brand@emallinator.com, and Phone (707) 244-9958. A 'Request Access' dialog box is overlaid on the bottom right, containing the text: 'You do not have permission to view Amy Brand's full information. Please request consent via one of the options below.' The dialog has a Cancel button and three buttons: Send Email, Send Text, and Verbal Consent, which are highlighted with a red box.

First Name	Last Name	DOB	Email Address	Phone	View
Amy	Brand	01/01/1990	amy.brand@emallinator.com	(707) 244-9958	▼



When meeting with a resident in person or via phone, the resident may provide **Verbal Consent**. Read the resident each statement and check the box to acknowledge agreement. When completed, click **Submit**.



The screenshot shows the 'Verbal Consent' form in the Kynect Resources application. The left sidebar contains navigation options: My Workspace, Referral Inbox, Referral Outbox, Referral Dashboard, Reports, Client Search (highlighted), My Favorites, Organization, Resources, and Staff. The main content area has a search bar and a 'Search By Category' dropdown. Below the search bar is a 'Back to Clients' link. The form title is 'Verbal Consent'. At the top right of the form are 'Cancel' and 'Submit' buttons, with the 'Submit' button highlighted by a red box. The form contains two sections of consent statements, each with a list of checkboxes:

By agreeing to share additional data you understand that Julie Macaron will be able to view:

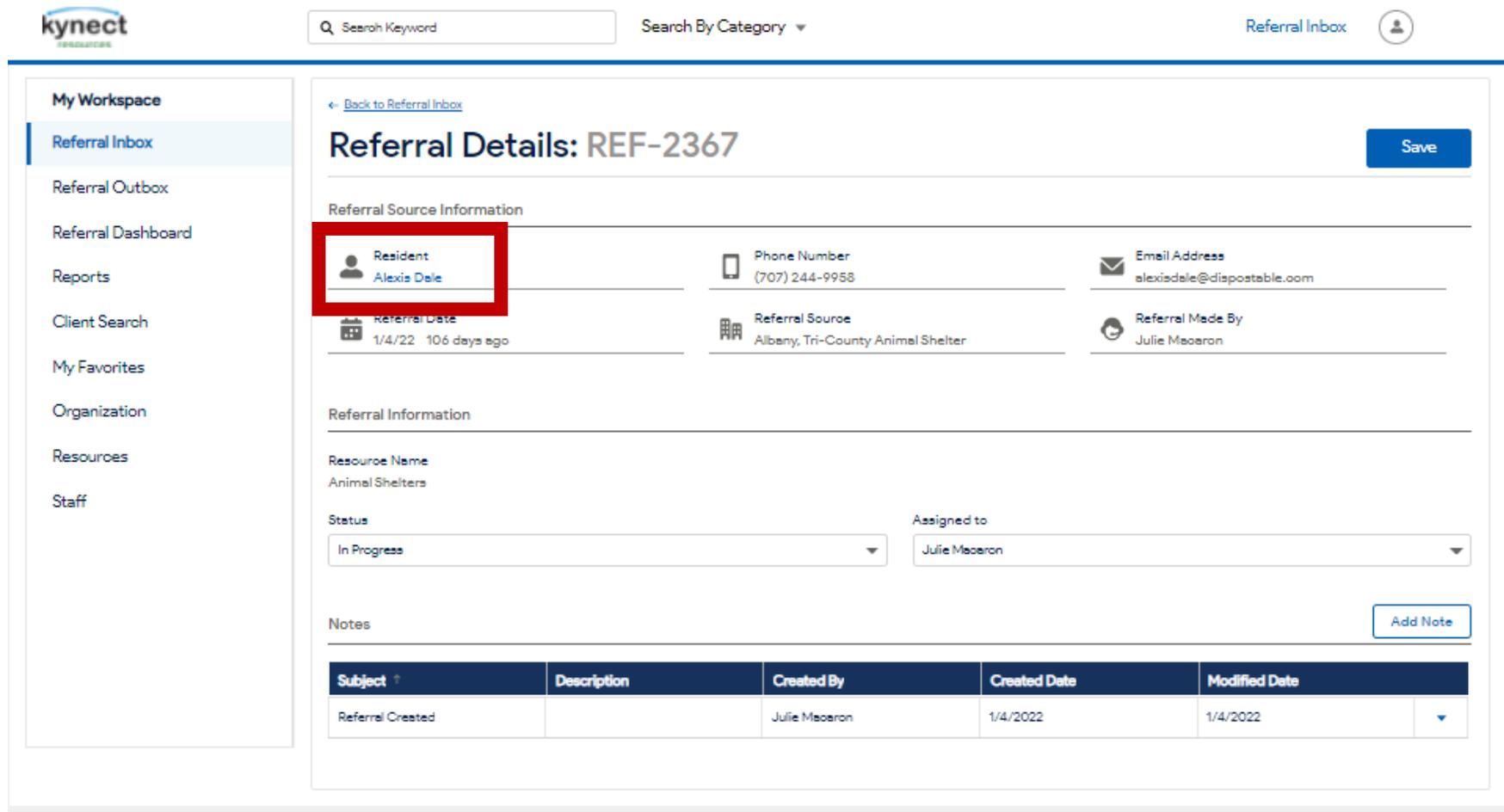
- Your name, address, date of birth, household composition, and contact information
- Your consent can be revoked - and it requires about one day to process the cancellation
- Your program enrollment information from programs such as Medicaid, SNAP, TANF, and other state programs
- Your referrals to other resources
- Your needs assessments and survey information
- Your BookYard referrals (past and present), showing the number of referrals that are new, in progress, and closed
- The information may be shared outside of Resource Engine to monitor quality or to provide better services
- You may be asked to fill out a survey about your experiences
- Your information without your name could be used to support state reporting on needs and resources in the community
- You can cancel at any time

Additionally, you understand that

- Your information, without your name, can be shared outside of this site to monitor quality or to provide better service
- Service providers can contact you regarding referrals to provide services
- You can remove any partner's access to your data, at any time, within the application
- You will not hold the site responsible in the event you do not receive the resources requested
- If you choose not to share your information with this community partner it will not affect your ability to use this site.



Once consent have been captured, users may use the **Resident link** to navigate to the detail record. Residents may revoke consent at any time.



The screenshot shows the 'Referral Details: REF-2367' page in the Kynect Resources system. The page includes a search bar, a 'Referral Inbox' link, and a sidebar with navigation options like 'My Workspace', 'Referral Inbox', 'Referral Outbox', 'Referral Dashboard', 'Reports', 'Client Search', 'My Favorites', 'Organization', 'Resources', and 'Staff'. The main content area is divided into sections: 'Referral Source Information', 'Referral Information', and 'Notes'. The 'Referral Source Information' section contains fields for Resident (Alexis Dale), Phone Number (707) 244-9958, Email Address (alexisdale@dispostable.com), Referral Date (1/4/22, 106 days ago), Referral Source (Albany, Tri-County Animal Shelter), and Referral Made By (Julie Maeron). The 'Referral Information' section shows the Resource Name (Animal Shelters), Status (In Progress), and Assigned to (Julie Maeron). The 'Notes' section has an 'Add Note' button. At the bottom, there is a table with columns for Subject, Description, Created By, Created Date, and Modified Date.

Subject	Description	Created By	Created Date	Modified Date
Referral Created		Julie Maeron	1/4/2022	1/4/2022

There are many actions and information available on the resident **Detail Screen**. Users may take actions such as **Start Assessment, Create Referral, View Notes, and much more.**

Quick Action Buttons

Integrated IEES Data Sources

Assessments inform SDOH data. This tab indicates the date of last assessment and from where it came.

← [Back to Clients](#)

Estill Powell

[Send Email](#)
[Add Note](#)
[Create Referral](#)
[Start Assessment](#)

Client Information

Client ID: 901007575 | Gender: Female

DOB: 12/01/1985

Household [View All](#)

Client	Age	Relationship
CLARK MERCER	19	Son
HAPPY BROTHER (Child)	35	Brother/ Half-Br...
RICHARDO POW...	9	Son
	59	Husband

Assessments [View All](#)

Date	Name	Taken By
1/21/2020	CMS Self-Su...	Catherine Eliza

Contact

Email Address: estill@gmail.com | Preferred Contact Method: Email

Mobile Phone: (303) 241-2679 | Address: 123 MAIN STREET NEW LANE FRANKFORT, KY 40601-

Enrolled Programs [View All](#)

Program	Start	Renewal
KTAP	6/1/2015	4/1/2016
Medicaid	6/1/2015	4/1/2016
Qualified Health ...	6/1/2015	4/1/2016

Notes [View All](#)

Subject	Created Date	Created By
Estill is expect...	1/21/2020	Catherine Eliza

Referrals [View My Plan](#)

New: 2 | In Progress: 0 | Closed: 0

Risk Factors [View All](#)

- Stable ● Vulnerable ● In-Crisis ● N/A
- Childcare
- Education
- Food
- Housing
- Access to Services
- Career Resiliency/Training
- Clothing
- Employment Stability
- English Language Skills
- Transportation

Referral Activity

SDoH Information

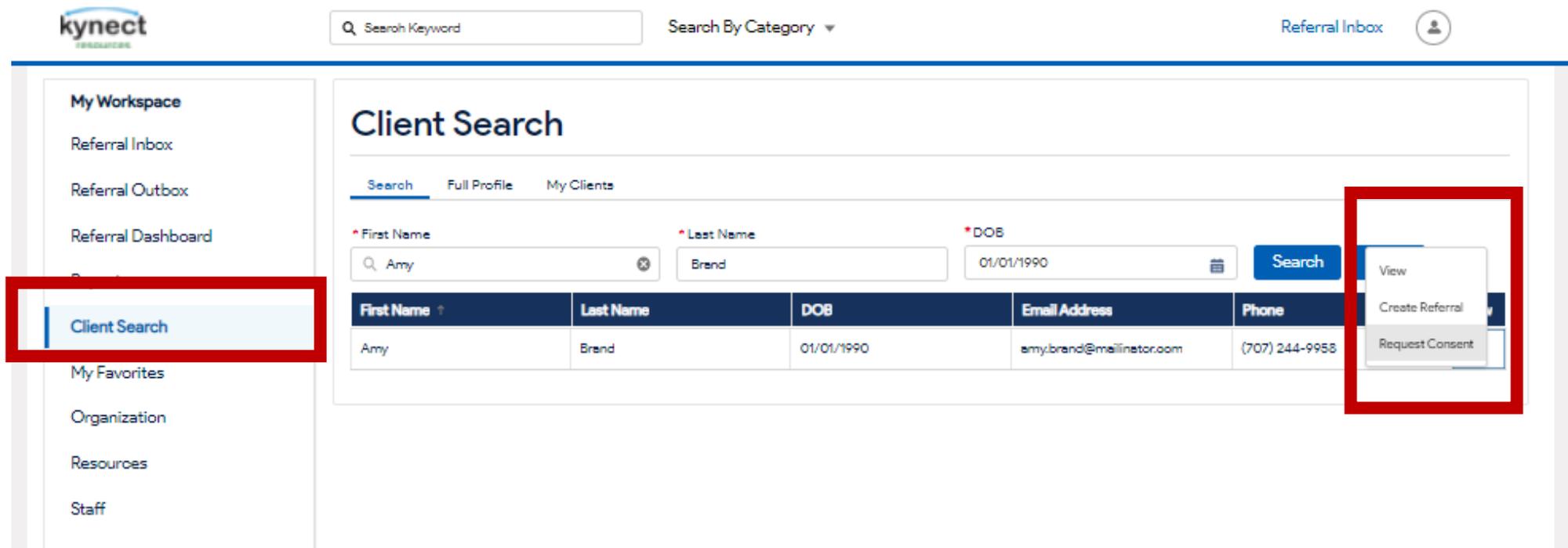
Coordination across partners

The **Request Consent** screen can also be accessed from the **Client Search** screen.

Click the **Edit** button to **View**, **Create Referral** or **Request Consent**.

Click **View** to move to the **Resident Detail Screen**.

Users are navigated to the **Consent** screen if consent has not previously been granted.



The screenshot shows the 'Client Search' interface. On the left is a navigation sidebar with 'Client Search' highlighted in a red box. The main content area has a search bar with 'Amy Brand' and '01/01/1990' entered. Below the search bar is a table with one row of client data. To the right of the table, a dropdown menu is open, showing 'View', 'Create Referral', and 'Request Consent' options, with the entire menu area highlighted in a red box.

Search Keyword Search By Category Referral Inbox

My Workspace
Referral Inbox
Referral Outbox
Referral Dashboard
Client Search
My Favorites
Organization
Resources
Staff

Client Search

Search Full Profile My Clients

* First Name * Last Name * DOB

Q Amy Brand 01/01/1990 Search

First Name	Last Name	DOB	Email Address	Phone
Amy	Brand	01/01/1990	amy.brand@mailinator.com	(707) 244-9958

View
Create Referral
Request Consent



Thank you

For additional support, please use the Help section in kynect resources or email kynectresources@ky.gov